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Case Study: USA-Fact Uses Mobile To Boost CRM Adoption And Productivity

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EXECUTIVE SUMMARY

What do you do when the economy tanks, sales shrivel, and profitability shrinks? This was exactly the challenge facing the management and sales team at USA-Fact, a pre-employment screening company. In the aftermath of the recent recession, it needed to boost revenue and sales productivity — and fast. To address this problem, the company implemented a mobile CRM solution and used mobile CRM best practices to boost productivity and sales performance. The result? User adoption of the company's CRM solution soared to 90%; two salespeople hit the same overall sales target that seven could not reach in the past; 2011 sales have increased by 12% compared with 2010; and the time to develop quotes for customers has been dramatically reduced.

SITUATION: USA-FACT NEEDED TO TURBOCHARGE SALES

USA-Fact is an Internet based pre-employment screening company. The firm provides its clients with an array of screening services, such as background checks, employment verification, drug testing, and medical license certification checks. USA-Fact operates in a very competitive industry and felt the sting of the recession when it hit in 2008. Since joining the company in mid-2010, USA-Fact's CEO and interim VP of sales, Matt Davidson, has been laser-focused on finding ways to increase sales while cutting costs — a daunting task.

During his first year with the company, Matt was on the road for up to three weeks per month, which made him realize the need for salespeople to be able to work on the go and be productive during downtime while in transit. The company was using SugarCRM as a sales productivity tool, but field salespeople were not using the solution to the extent that both they and the company were getting full value out of its capabilities. On the recommendation of Epicom, USA-Fact's SugarCRM integration specialist and development partner, Matt decided to look at a mobile CRM solution. In December 2010, the company deployed Sugar Mobile on iPhones. Four members of the executive and operations group use this solution, as do two members of the newly sharpened sales team.

Through the use of mobile CRM best practices, USA-Fact has been able to enforce the idea of a chain of custody for leads and quotes, assign responsibility for all phases of the sales process, keep sales reps focused on results, improve efficiency, and drive significant revenue growth.

BEST PRACTICE: USA-FACT USED MOBILE CRM TO MEET ITS PRODUCTIVITY GOALS

A solid approach to mobile CRM starts with recognizing where an organization can realize immediate benefits on the business side. What sorts of goals result in effective mobile applications? In general, look for situations where you can integrate a mobile application into the normal execution of day-to-day business processes. Matt spotted several opportunities to apply mobile CRM best practices to improve the productivity of sales and management personnel in the field:

- **Focus on improving CRM adoption.** On the road for much of his first year, Matt discovered firsthand how much lost time due to travel can mean to a company. He also observed that there were many places where Wi-Fi connections were not available, making the use of laptops for completing sales reporting and quoting tasks impossible. By providing mobile access to the company's CRM solution via a smartphone, USA-Fact enables field personnel to update the system and tasks in real time throughout the day when they're in the field — rather than doing it once they get back to their desks at the end of the day. A smart mobile device allows connectivity anywhere there is a mobile phone signal. Therefore, the information collected is fresher, more complete, and more accurate. Matt warns, however, that "Keeping it simple is the key to user adoption. Focus on the things that need to be there; employees will then look for ways to improve it."

- **Integrate the end-to-end sales process with clear accountability.** Matt also realized that the ability to work on the go would not only allow his salespeople to better use their time in the field, but it would also help them focus purely on business results and eliminate excuses about losing time due to travel. USA-Fact enforces the idea of a chain of custody for leads and quotes through its CRM's opportunities and cases module; it also manages operational cases in a unique manner. Cases are always reassigned to the original creator for review and approval prior to their closure; a mobile CRM application on a smartphone enables case creation on the go, and automatic notification speeds case reassignment. This unique, intentional extra step ensures rock-solid communication. Using Sugar Mobile, a salesperson can likewise create a lead or an opportunity immediately and assign it to someone for follow-up in Sugar CRM. As Matt puts it: "A mobility solution removes excuses. Our sales team can be held to expectations and now communicates in a way that brings better efficiency to the operations team."

- **Speed up approval processes.** Mobile devices can support managers across operational groups like sales to complete workflow approvals in near real time, speeding the decision-making cycle. In the case of USA-Fact, Matt says that "Quotations are routed to me for fast approval. We handle expense approvals the same way."

Next Steps: USA-Fact Plans To Add Additional Functionality And Integrations

At present, USA-Fact has deployed Sugar Mobile without any customization. As Matt explains, "Our Mobile CRM is a functional cog in the machine — we haven't had to think about it. It's an

unexpected benefit of a system we already like. We hope to do more with it in the future." Matt plans to review the mobile customizations available with SugarCRM to see if he can find other ways to enhance and speed the selling process. Looking forward, USA-Fact plans to:

- **Integrate billing and CRM.** The integration of USA-Fact's billing system with Sugar Mobile will allow sales reps to see open invoices, track orders on inventory, and assist the accounts receivable department. Sales reps will be able to retrieve order history from the billing system when in the field, allowing them to have important information while traveling. The integration, which uses an off-the-shelf plug-in to connect the two applications, is currently underway; Faye Business Systems is assisting USA-Fact with the integration.

- **Expand functionality to include signature capture.** In mobile CRM solutions, a signature applet enables touchscreen-equipped handheld devices to capture, view, and print signatures. USA-Fact is considering using its mobile devices for customer signature capture to speed up the order process.

- **Enhance quoting capability.** A quoting module in a CRM solution enables sales representatives to manage orders and quotes. USA-Fact is considering making a template for quotes set for various discount levels available on its mobile devices so that salespeople can quickly determine the correct price while at the customer site, which will greatly speed up the quoting process.

- **Explore the iPad as a replacement for laptops.** Currently, USA-Fact salespeople travel with both traditional laptops and smartphones (iPhones). Both provide access to the company's SugarCRM solution. Matt says the company is considering providing iPads to salespeople to further improve their productivity in the field. He says that "They would have the ability to create a quote and show it to clients immediately on the screen. An iPad tied to web-based CRM and cloud sales tools could be the only tool that the sales team would need in the field. And the ability to rotate the screen to show the customer the quote is a nice idea."

BEST PRACTICE RESULTS: USA-FACT IMPROVED CRM ADOPTION AND INCREASED SALES

A mobile CRM solution helps ensure that USA-Fact sales reps have timely and updated information when visiting clients and managers are able to see what reps in the field have been up to in near real time. The quoting process is now more efficient, and accountability for following up leads has been systematized. The benefits that USA-Fact realized from implementing a mobile CRM solution include:

- **Improved adoption of CRM tools.** Matt reports that just about all — 80% to 90% — of the managers, directors, and sales team members are now using a major sales or operational function within the CRM system.

- **A more productive sales force.** By adding mobile access to its CRM system and enforcing a more disciplined sales process, USA-Fact says that it now has two salespeople hitting the overall targets that seven reps could not achieve previously.

- **Significant revenue increases.** Despite a continued difficult economic climate in its industry, USA-Fact has posted a year-to-date increase in sales of 12% in 2011 over its 2010 sales. Matt attributes this to enforcing a more disciplined selling process and supporting salespeople to be more productive by providing mobile access to its CRM solution.

- **A more efficient quoting process.** Matt reports that it used to take three people 45 minutes to build a quote. This time to create a quote is now down to 5 minutes; the fastest time clocked was 4 minutes.